



Shopify practical guides

Shopify Basic: set up and manage your first store

Seventeen operations, from catalog to launch, each with its own check.

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How to use this guide

This guide is a working path for anyone learning Shopify: preparing a catalog, organizing the site, setting up sales and handling orders. "Basic" refers to the guide's introductory level, not to the Shopify Basic plan; not every feature here is necessarily included in that plan. Check availability, permissions and costs in your own account.

I'm Francesco Guiducci, a freelance Shopify consultant and developer based in Rome. My background is in mechanical engineering, and I work on stores, themes, Liquid and apps. I built the chapters around the operations a merchant has to be able to complete and verify.

To practice, prepare a sample product, a collection and an information page in a suitable environment. If the store already sells, don't use real orders or customers for tests. A theme copy protects your layout work, but it shares the store's products and settings: it does not isolate payments, inventory or automations.

1 - Understand what Shopify manages

Shopify covers catalog, order and customer administration, plus the tools you sell with. The online store is one channel; other channels and point of sale have their own requirements, costs and setup.

The platform hosts the service. Access, content, settings, installed apps and operating procedures remain your responsibility. Not every change needs code, but a requirement the theme doesn't support may need a developer.

Before choosing a plan, list what you need: channels, people who need access, markets, payments, reports and integrations. Compare the current offering, not a pricing table copied from an old guide. Shopify Analytics' main features are available on any plan; still check individual features and staff permissions.

Chapter result. A requirements list, each item with verified availability and its actual cost where one applies. Resolve any missing requirement before you commit budget.

2 - Sign in and protect the account

Sign in through Shopify's official address or your store's admin link. Check the domain in the browser's address bar, then select the right store if you manage several.

Turn on two-step authentication in the account security settings. Use a supported method, such as an authenticator app or a security key, and keep the recovery codes somewhere separate. An emailed code is not the intended second factor. SMS can no longer be set up as a new method; it keeps working only where it is already active.

Give each collaborator their own access, with only the permissions they need. The owner keeps control of the domain, billing and account recovery. Record who may authorize app purchases and payment changes.

- ☐ Sign out and back in with the configured method.
- ☐ Confirm the recovery procedure is available, without exposing its codes.
- ☐ When a collaborator's work ends, review or revoke their access.

3 - Find your way around the admin

Menu positions can change. Learn what each area is for, and use the admin search when an item moves.

Area	Main operations
Orders	Payments, fulfillment, returns, history
Products	Items, variants, inventory, collections
Customers	Profiles, segments and marketing status
Content and Online Store	Files, pages, navigation, blog and theme, depending on the area available
Analytics	Metrics, reports and comparisons
Discounts	Promotional rules and usage
Apps and channels	Installed features and connections
Settings	Store details, payments, delivery and general configuration

Before saving, reread the name of the object you're editing. After saving, reopen it: a filled-in form doesn't prove the change was saved.

Exercise. Find the sample product, its collection and the theme that displays it. Note the three separate identities: a product and its page template are different objects.

4 - Configure store details

Gather the business name, business address, admin email, customer contact, language, currency and time zone. For a business run from Rome, use Europe/Rome: discount deadlines and reports must be read in the same time zone.

Update each value in the relevant settings area, save, and check where it appears. Checkout, notifications and information pages can use different fields, and changing an address in one place doesn't update text written by hand elsewhere.

For prices and taxes, prepare a specification with the professional who handles your accounts. Don't pick a tax exemption just because the currency is foreign. Before changing the currency or country of a store with sales history, assess the effect on catalog, payments and reports.

Field	Approved value	Surface checked	Date and owner
...	...	...	...

Keep sensitive data out of copies shared for site review.

5 - Create a complete product

Open Products and create a draft item. Use real sample data; if the products are for practice, keep them in the test environment.

1. **Title and description.** State what it is, intended use, materials, dimensions, what's included and limits. Back performance claims with documents; never invent reviews.
2. **Media.** Upload images that match the sample, set their order and write useful alt text. Check how they look in the theme.
3. **Price.** Enter the approved price. A compare-at price needs a real saving and verified promotional rules. Cost per item is not the full cost of an order.
4. **Inventory.** Use unique SKUs that follow an internal convention. Enter a barcode only if you have a correct one. Check location, quantity and the out-of-stock policy.
5. **Variants.** Define clear options, then check price, media, SKU, weight and availability for every combination.
6. **Delivery.** Mark physical products and enter the relevant weight. For digital content, also configure the service that delivers the file: writing "digital" in the description isn't enough.
7. **Organization.** Choose a category, product type, collections and useful tags. A standardized category doesn't guarantee SEO rankings.
8. **Publishing.** Check status and channels. Saving doesn't necessarily make the item purchasable.
9. **SEO.** Prepare a readable title, description and handle. Search engines may show different text from what you entered.

Variant example: three sizes and two colors make six combinations, and you need to confirm all six exist. Shopify documents up to 2,048 variants and three options per product, but themes, apps and channels may set lower limits. Test compatibility before designing a large catalog.

Acceptance check. Select every variant, add it to a test cart, change the quantity and compare the total. Try an out-of-stock item and read the message. Use the Product page template for the copy and the Image checklist for the photo batch.

6 - Organize collections and navigation

A collection groups products by a criterion. A menu item points to a destination: creating a collection doesn't add it to any menu.

For a short editorial selection, use a manual collection. For a stable rule, consider an automated collection: write the rule in plain language first ("all products with this tag that are available for this offer"), then check the all/any condition logic in the admin.

1. Write a title and description that match the content.
2. Add products or conditions, and save.
3. Verify inclusions, exclusions and sort order.
4. Link the collection from the relevant menu.
5. Open that link in the storefront.

Minimum test: one product that should be included, one that shouldn't, and one whose attribute changes. Don't call a selection "bestsellers" without sales data. A hierarchy in the menu doesn't create parent-child relationships between collections.

7 • Customize the theme within a clear scope

Before extensive work, duplicate the theme and name the copy with a date and purpose. Work on the copy, checking its identity in the editor. A copy is not a complete store backup: it holds the theme, not products, customers, orders or settings.

Configure fonts, colors, widths and navigation first, then the homepage, product page, collection and information pages. Use enough content to judge the layout: a very short title doesn't test a category with long names.

A template can be assigned to several pages or products. If you change a shared template, the change can spread to every resource that uses it. For a different structure, create and assign a template the theme supports instead of duplicating the whole site.

A free theme isn't automatically unsuitable, and a paid theme doesn't guarantee the functions you need. Check the actual components, accessibility and behavior.

- ☐ Test mobile, desktop and keyboard.
- ☐ Check menu opening and closing, focus, images, variants, cart and links.
- ☐ Publish the copy only after a decision, and keep a reference to the previous version for recovery.

8 • Manage copy and translations

Keep theme text, catalog content, notifications and translations apart. Editing the default theme wording doesn't control an app's emails or every checkout step.

For a second language, build a small glossary: product names to leave untranslated, technical terms, units, shipping and returns. Use the translation workflow available in your store, then review the decisive information by hand.

Test sequence: open a product in Italian, switch to English, select a variant, open the cart, reach checkout and go back to the page. Check links, language, currency and whether the selection is kept. Also test missing content and fallbacks.

Don't translate trade names without a reason, and don't convert units without a checked calculation. A correct translation keeps limits, conditions and quantities intact. Record a published language separately from one that is only prepared.

9 · Handle an order from arrival to closure

When an order arrives, open it in the admin and check products, variants, quantities, payment, address, availability and notes. Emails are alerts; the order and transaction statuses are your operational reference.

Before fulfillment, confirm that the payment status and your internal process allow dispatch.

"Authorized," "paid" and "pending" are not synonyms. If there is a risk or the details are inconsistent, assign the check to a person.

Fulfillment. Select the items actually prepared, enter the correct carrier and tracking number, and check the notification option. For a partial shipment, verify what is still outstanding. A fulfilled order is not a delivered order.

Refund or cancellation. Reread the amount, the items and the operations already done, and decide separately whether stock goes back to inventory. A refund issued from the admin can't be undone, and the original card processing fee is not returned: follow the method and provider.

Documents. An order printout or an Order Printer template doesn't by itself establish correct invoicing. The document process must follow the specification approved for the business.

Exercise. Simulate two items, one available and one delayed. Record what you would tell the customer, which items you would fulfill and what would stay open. The Orders and support guide covers exceptions and responsibilities in more depth.

10 · Configure and verify payments

Open the payment settings and check eligibility, accounts, documents and the bank account required. Record actual costs: no method is always cheaper than another.

For a manual payment, write clear instructions and name who confirms receipt. A customer who chooses bank transfer hasn't paid yet. For providers and wallets, check availability by country, currency and account.

Test a successful and a declined payment in a suitable environment. Test mode applies to the whole store, so don't turn it on for a store that is taking real orders. Don't fulfill test orders, because shipping labels you buy are charged, and switch off any auto-fulfillment apps first. Simulated transactions don't appear in payouts and don't verify bank deposits.

Before real selling, turn test mode off, save and reread the setting. Don't promise payouts within 1–3 days for every account: check the current conditions and status. For identity checks, currencies, reconciliation and troubleshooting, use the guide [Configure and manage Shopify Payments](#).

11 · Configure shipping without coverage gaps

List products, locations, countries served, weights, costs and timing. Separate preparation from transit. Assign products to the right profiles and create zones and rates that match the service you actually offer.

Teaching example: paid shipping below €50 and free shipping from €50. Decide what happens at €49.99, €50 and €50.01, so no range is left without a rate. Also check discounts and products from different profiles, because the resulting total can change.

For pickup and local delivery, verify the location, coverage area, hours, availability and instructions. Don't present them as equivalent to shipping.

Destination	Weight	Cart	Against the threshold	Rate shown	Expected result
Supported / excluded	Low / high	Single / mixed	Below / at / above	...	...

Fix any differences before opening the market. To judge whether the threshold is sustainable, use the [Prices and margins](#) guide.

12 · Create a discount you can control

Define purpose, audience, products, duration and minimum margin. Then choose between a code and an automatic discount, and set the available conditions: fixed amount or percentage, threshold, usage, recipients and combinations.

Saving doesn't make the discount active right away: check the dates and time zone. Record when it starts and ends, who approves it and how it is switched off.

- ☐ Eligible cart.
- ☐ Excluded cart.
- ☐ Amount below the threshold.
- ☐ Combination with another promotion.
- ☐ Attempt outside the period.

For "Buy X, get Y," check that the required items are in the cart and that the benefit applies as intended. Don't promise automatic item insertion unless you've tested it.

Example: a 10% discount takes €50 to €45. That doesn't mean profit falls by 10%: recalculate costs and contribution. Don't use timers that restart on every visit to fake a deadline that doesn't exist.

13 · Install an app for a specific need

Write down the problem before you search for an app, and check whether Shopify or the theme already solves it. For each candidate, examine current cost, usage limits, permissions, the data it handles, compatibility and how to remove it.

Install only after deciding on cost and access. Finish the setup and test the function in the storefront: "installed" doesn't mean "visible and working." Check for notifications or automations the setup might switch on.

Keep a register of app, purpose, owner, charges, components added and the latest test. Before uninstalling, export what you need and check what remains in the theme or in external services. A theme copy doesn't restore app data.

For abandoned checkout recovery, use the current Shopify Messaging workflow. Activating the new automation is a permanent change: you can't go back to the previous emails, and the old settings keep working only until Shopify removes them. Don't create two automations that send the same message.

14 · Read data without confusing metrics

In Analytics, choose the period, channel and currency before interpreting results. Save a useful view and note the metric's definition. The main Analytics features are available on any plan; don't attribute them only to higher plans.

Question	Check
How much did we sell?	The report's definitions of gross, net and total sales
How many visits became purchases?	Sessions and converted sessions within the same scope
What is an order worth?	The AOV formula and how discounts and refunds are treated
What reached the bank?	Payout reconciliation, kept separate from sales

Teaching example: 20 converted sessions out of 1,000 sessions is 2%. Don't swap the denominator for unique users, and don't put every multichannel order in the numerator.

For GA4, follow the official setup through Google & YouTube and check that no duplicate integration already exists. You don't need to connect Merchant Center to set up GA4 tags. While the store is password-protected, GA4 records no events.

Compare suitable periods and flag small samples, consent changes and promotions. A drop in a report can come from tracking or traffic mix: verify the data before changing the site.

15 · Manage customers and newsletters

A customer profile doesn't prove a marketing subscription. Before adding someone to a campaign, check their status, source and preferences. Keep only relevant internal notes and restrict access to the data.

Prepare a signup form with a clear promise: what kind of content subscribers will get and the actual benefit, if there is one. Test signup, confirmation (where configured) and unsubscribe with an authorized test address. Check that the language of the communication matches the choice.

For campaigns, use the tool your store provides, such as Shopify Messaging, or a suitable integration. Check current prices and thresholds; don't choose based on figures from an old free plan.

Before sending, verify the audience, subject, body, links, sender and destination page. Save a draft and keep approval separate from sending. For privacy and the applicable legal grounds, use the procedures approved for your business: this guide is not a legal rule.

16 · Connect the domain and publish

If you already own a domain, find out who controls the registrar and DNS. Follow the current values Shopify provides, keep the previous configuration and don't overwrite unrelated email records.

After connecting, check status, HTTPS, primary domain and redirects. Test the www and non-www versions according to the configuration you chose. Propagation can take time: judge the actual status, not the moment you saved.

Before removing the password, gather the results for catalog, payments, delivery, approved taxes, notifications, policies, the mobile, desktop and keyboard journeys, and access. A skipped test stays unverified.

Publish the correct theme and remove the password once the responsible person decides. Open the public domain in a new session and repeat the main journey. Record the date, version and open issues: a preview doesn't prove the public result.

17 · Ask for support with useful information

Before opening a ticket, note what you were doing, the result you expected and the result you saw. Add URLs, non-sensitive IDs, the date with time zone and the steps to reproduce. Redact personal data, and never send passwords or card security codes.

For platform behavior, use Shopify's help center and the support channels available once you're signed in. For an app, contact its developer; for a custom theme or integration, find out who maintains the code. Don't assume guaranteed response times.

To work with me, current contact details are at ifgdigital.com. State the store, the problem and the impact: an unreadable page, a blocked order and a request for a new feature need different responses.

Practice and review plan

Complete three sessions, each with a verifiable result:

1. **Catalog.** One product with variants, a collection, the menu and content in Italian and English.
2. **Selling.** Shipping matrix, test discount, simulated checkout and order procedure.
3. **Launch.** Domain, notifications, reports, access and a register of checks.

Every week, review open orders, customer requests, pending payments and content that needs correcting. Every month, compare revenue, costs and reconciliation differences. The Advanced guide goes deeper on architecture, integrations and experiments, once these foundations are stable.

Sources

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